

Fig. 1

Search

Agent

Last

Update

ADD

Internet Portal.com (personalized page)

Server Name	User Name	Password
LBC.com	John Doe	XXXXXXXX
My Bank.com	John R. Doe	XXXXXX
My Stocks.com	John R. Doe	XXXXXXXXXX
My Shopping.com	Jane L. Doe	XXXXXXXX
Mortgage.Com	John/Jane Doe	XXXXXXXXXX
Airline.com	John Doe	XXXXXX

Search String

Search

Fig. 2

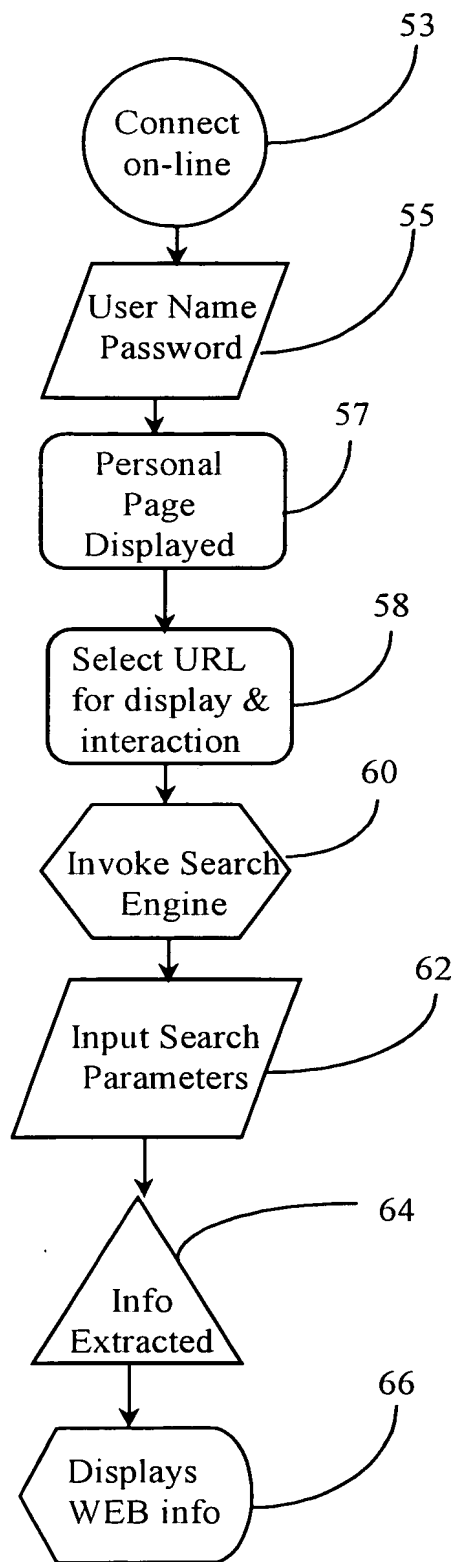


Fig. 3

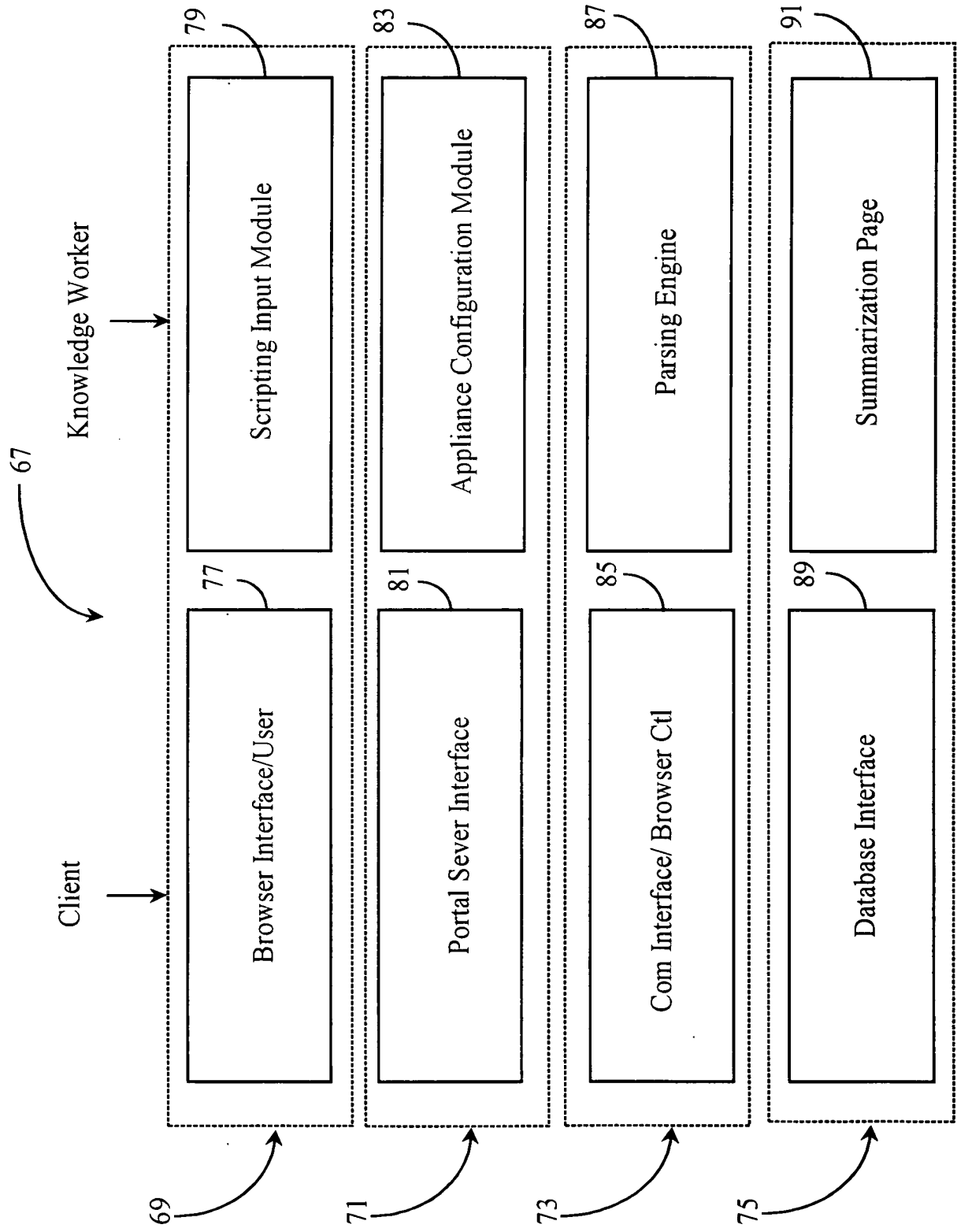


Fig. 4

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graph TD
    93[/New request arrives/] --> 95[Request is analyzed]
    95 --> 97[Knowledge worker accesses site logic]
    95 --> 99[Knowledge worker creates template]
    97 --> 99
    99 --> 101[(Template is stored)]
    101 --> 103[Browser control navigates to site]
    103 --> 105[Auto login is performed to gain access]
    105 --> 107[Site is parsed for data]
    107 --> 109[On demand?/Scheduled?]
    109 --> 117[Network appliance and delivery method verified]
    109 --> 111[(Summary data stored for latter use)]
    117 --> 119[Summary data delivered according to protocol]
    119 --> 121[User receives requested information]
    111 --> 113[Data is compiled and rendered as HTML]
    113 --> 115[WEB summary made available to user]

```

Fig. 5

```

graph TD
    117([New summary process begins]) --> 119[(Data base reviewed)]
    119 --> 121[Knowledge worker accesses site logic]
    121 --> 123[Knowledge worker modifies/creates template if required]
    123 --> 125[(Template is stored)]
    125 --> 127[Browser control begins navigation process]
    127 --> 129[Auto logins performed at each site]
    129 --> 131[Sites are parsed for summary data]
    131 --> 133[(All data stored)]
    133 --> 135[Data is compiled and rendered as HTML]
    135 --> 137{{WEB summary made available to user}}

```

Fig. 6

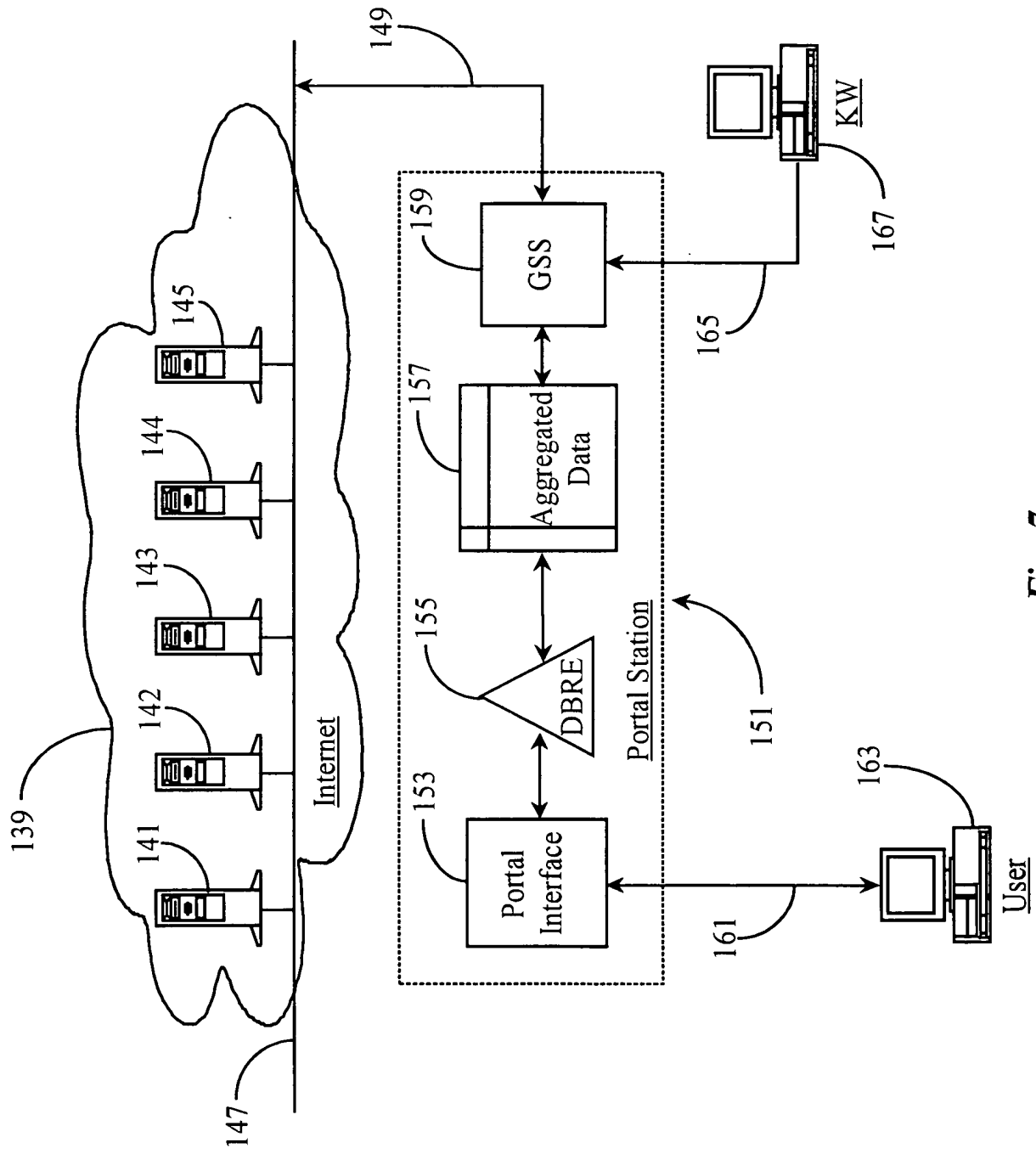


Fig. 7

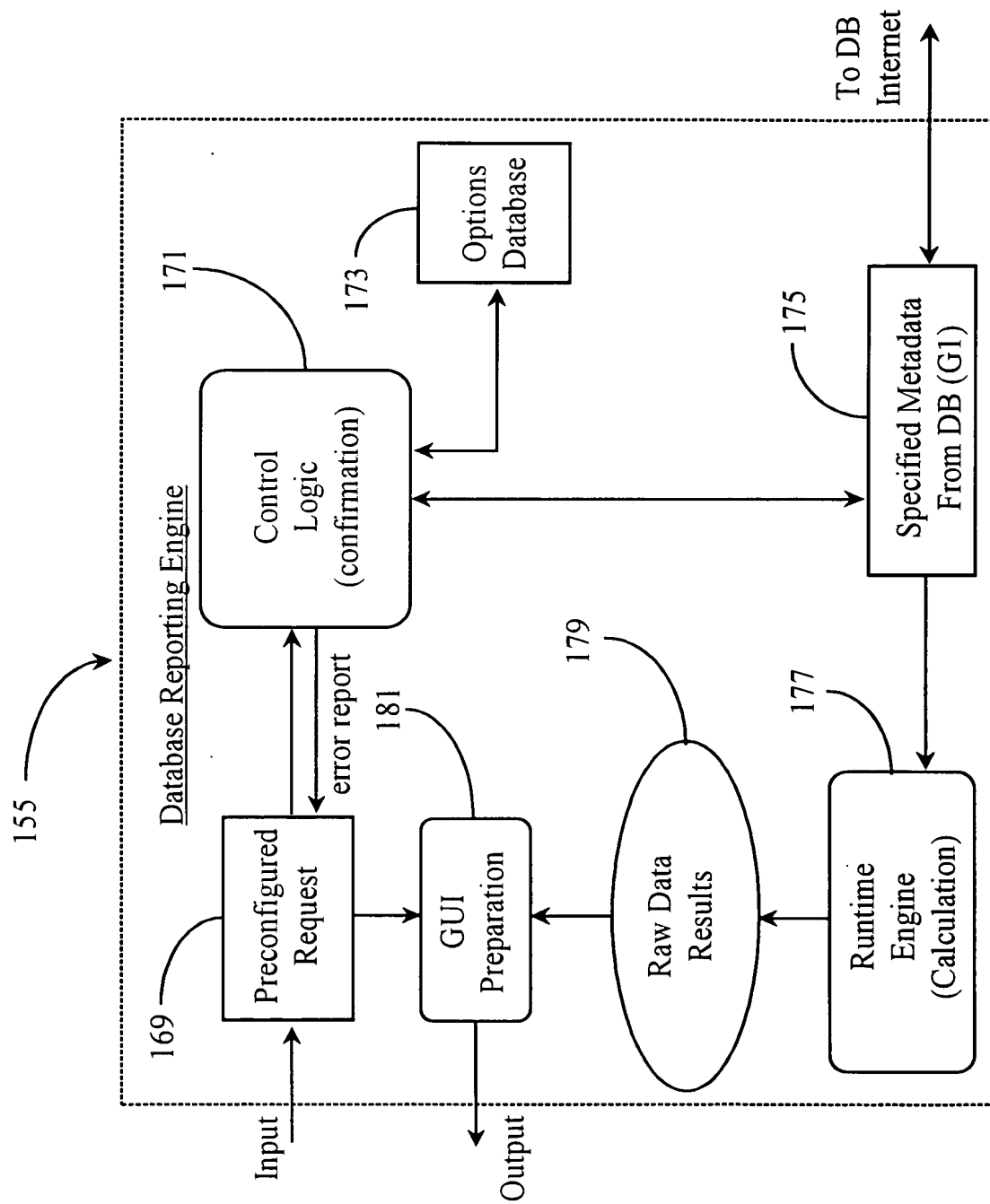


Fig. 8

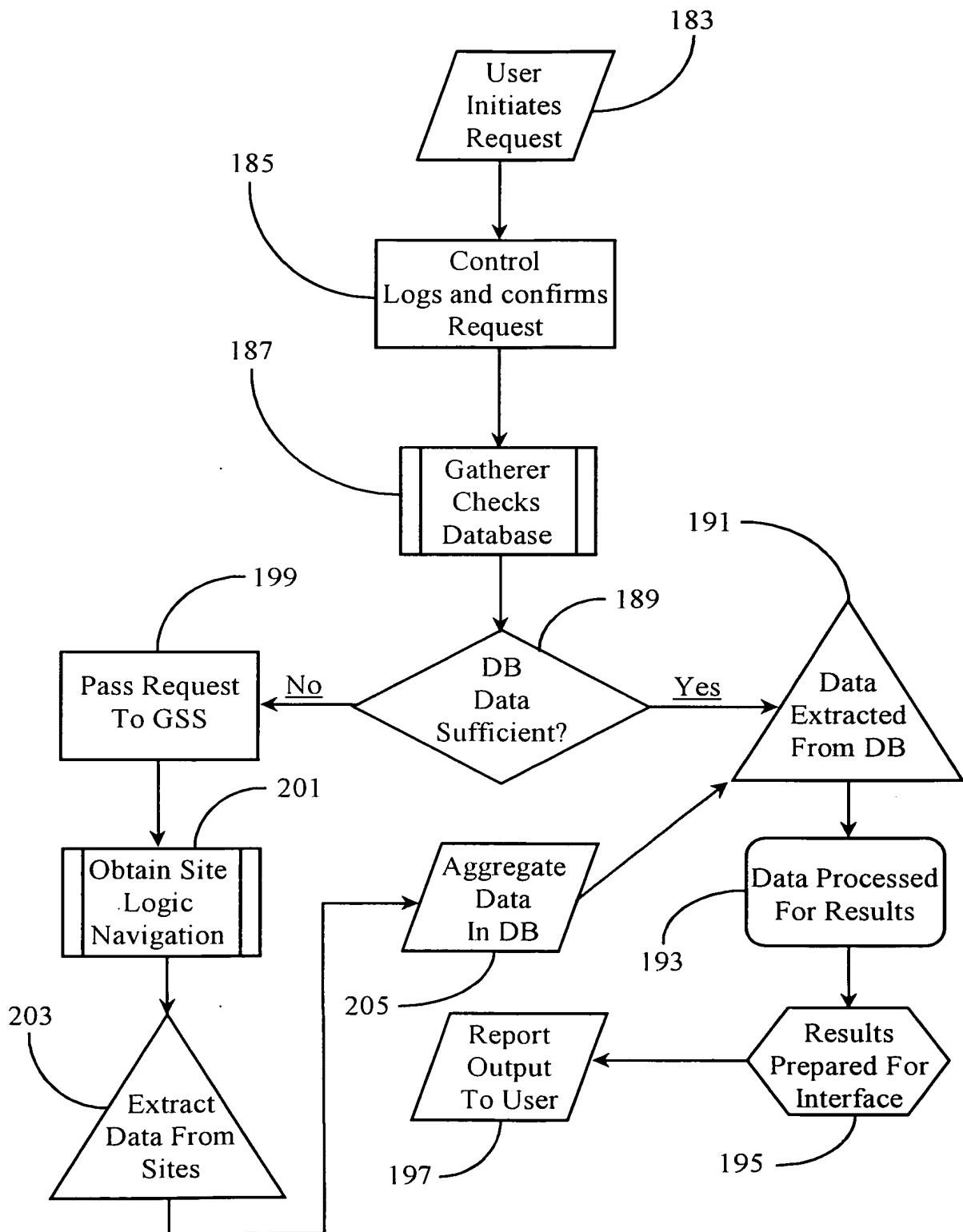


Fig. 9

00/201" 80286960

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Personal's Yodlee - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Related

Address http://sunserver.20000/magic/boon/boon_anchor=0174b64rt_lab_id=45th174b

Links »

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Banks

Stanford Federal Credit Union

Account	Balance
Savings - 1	0.15

Last Refresh: 8 days ago - Refresh

Wells Fargo

Account	Balance
CHECKING	34973.92
CHECKING	35457.68
MIRA	40779.89
SAVINGS	101.60

Last Refresh: 8 days ago - Refresh

Bank Summary

Summary	Amount
TOTAL BALANCE	111313.24

Investments

Datek Online

Symbol	Quote	Quantity	\$ Change
CSCO	69	1	- 3/8
HLIT	112 3/8	1	-4 5/16
portfolio_balance			N/A

Total Account Balance 2029.55

Last Refresh: 2 hrs ago -

Investment Summary

Summary	Amount
TOTAL STOCK BALANCE	181.375
TOTAL ACCOUNT VALUE	2029.55

12:29 AM Start C. M. Y. Y. C. A. G. E. E. W. P. E. Mi. Local Inter

Fig. 10

00/2207" 80/85950

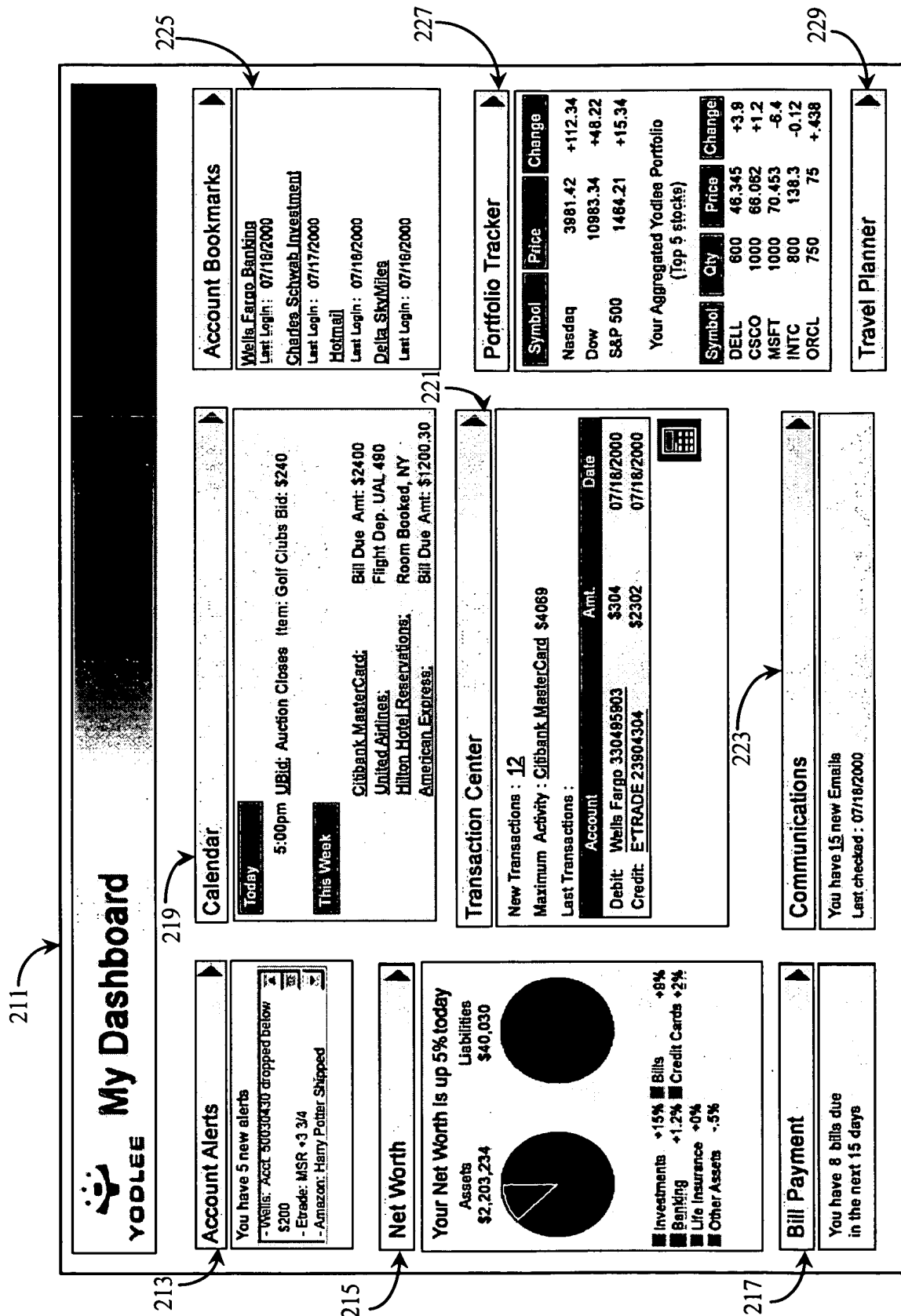


Fig. 11

Click on an Account to log in

My Dashboard

YODLEE CALENDAR

DAY WEEK MONTH YEAR

◀ JULY 2000 ▶

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today is July 18th, 2000

Add

Show:

- ☒ Auctions
- ☒ Shopping
- ☒ Travel
- ☒ Bills
- ☐ Banking
- ☒ Credit Cards
- ☒ Investments

JULY 18 - 24, 2000▶

Print

Tuesday July 18th

5:00pm UBid: Auction Closing - Item: Golf Clubs HighBid: \$240

Wednesday July 19th

8:00am United Airlines: Flight Departure - Flight # UAL490 Departing SFO

10:00am Hilton Hotel Reservations: Room Booked - New York Hillon, Single Room

Thursday July 20th

All Day Citibank MasterCard: Bill Due - Amt. \$2400

Friday July 21st

8:00am - 9:00am Tee Time - Silver Vista Golf Club. Call Jim.

Saturday July 22nd

All Day Amazon.com: Back Order 1205043 Due to ship - Item: Harry Potter Price: \$20

All Day PacificBell: Bill Due - Amt. \$100

Sunday July 23rd

All Day PG&E: Bill Due - Amt \$100.34

Monday July 24th

All Day American Express: Bill Due - Amt. \$1200.30

235
237
239
241

Fig. 12

00/220T"80/286960

YODLEE

My Dashboard

TRANSACTION CENTER

Tuesday, July 18th

Select an Account:

Chase Visa Credit

Delete

Archive

Date

Description

Amount

Category

Delete

Email CPA

07/14/2000

Pizza Hut, San Jose CA

\$34.12

Dining Out

☒

☐

07/15/2000

AT&T Wireless, CA

\$18.99

Utilities

☒

☐

07/16/2000

BEST BUY, Redwood Cty, CA

\$340.23

Home

☒

☒

07/17/2000

Honda City, San Jose, CA

\$72.54

Auto

☐

☐

07/18/2000

Barnes and Noble, San Jose CA

\$13.02

Misc.

☒

☐

Email My CPA

View History

Bill Payment

New Transaction Summary

Chase Visa Credit Card : 5 new transactions

Wells Fargo Savings : 3 new transactions

Wells Fargo Checking : 2 new transactions

ETRADE : 2 new transactions

Fig. 13

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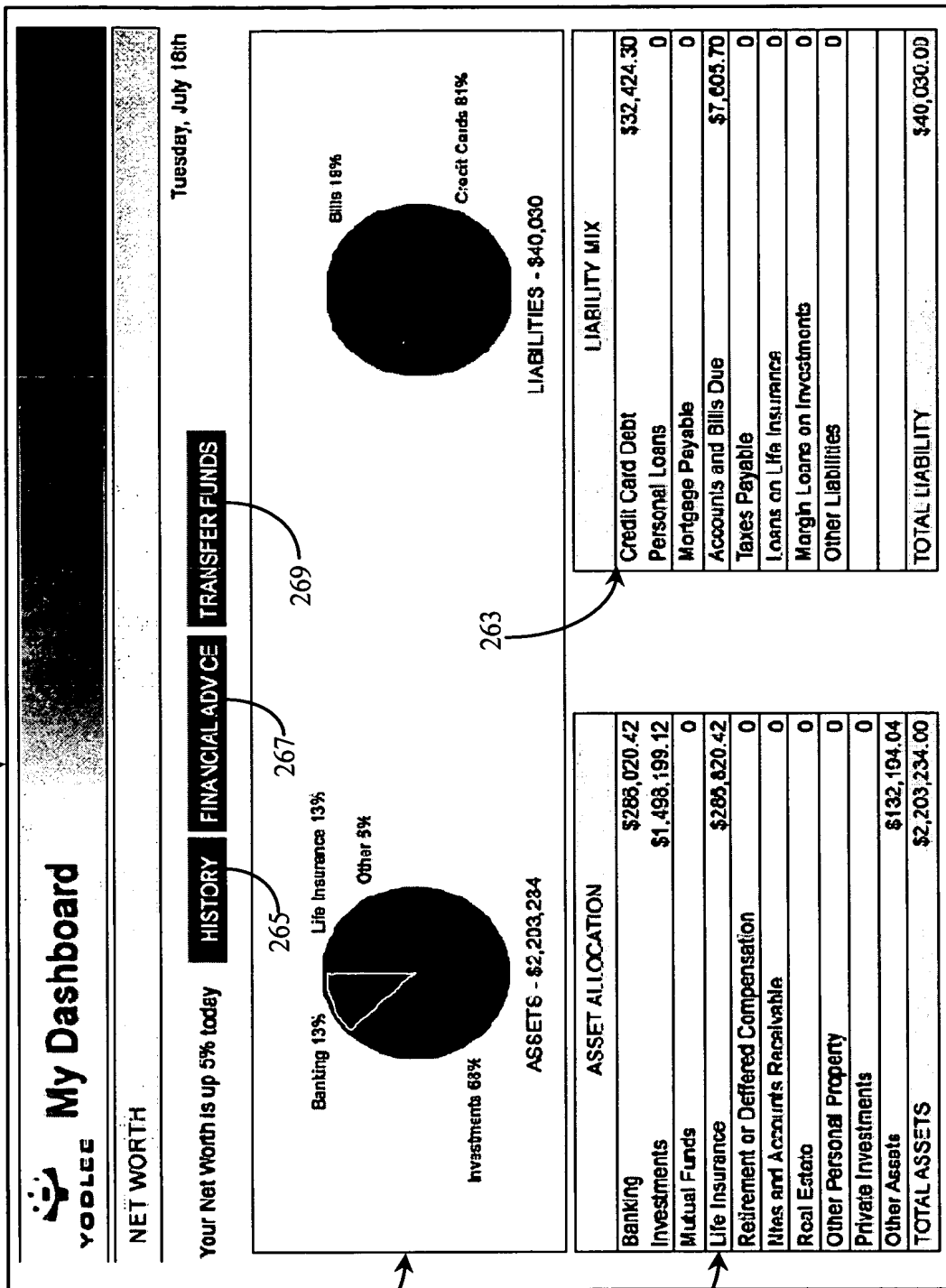


Fig. 14

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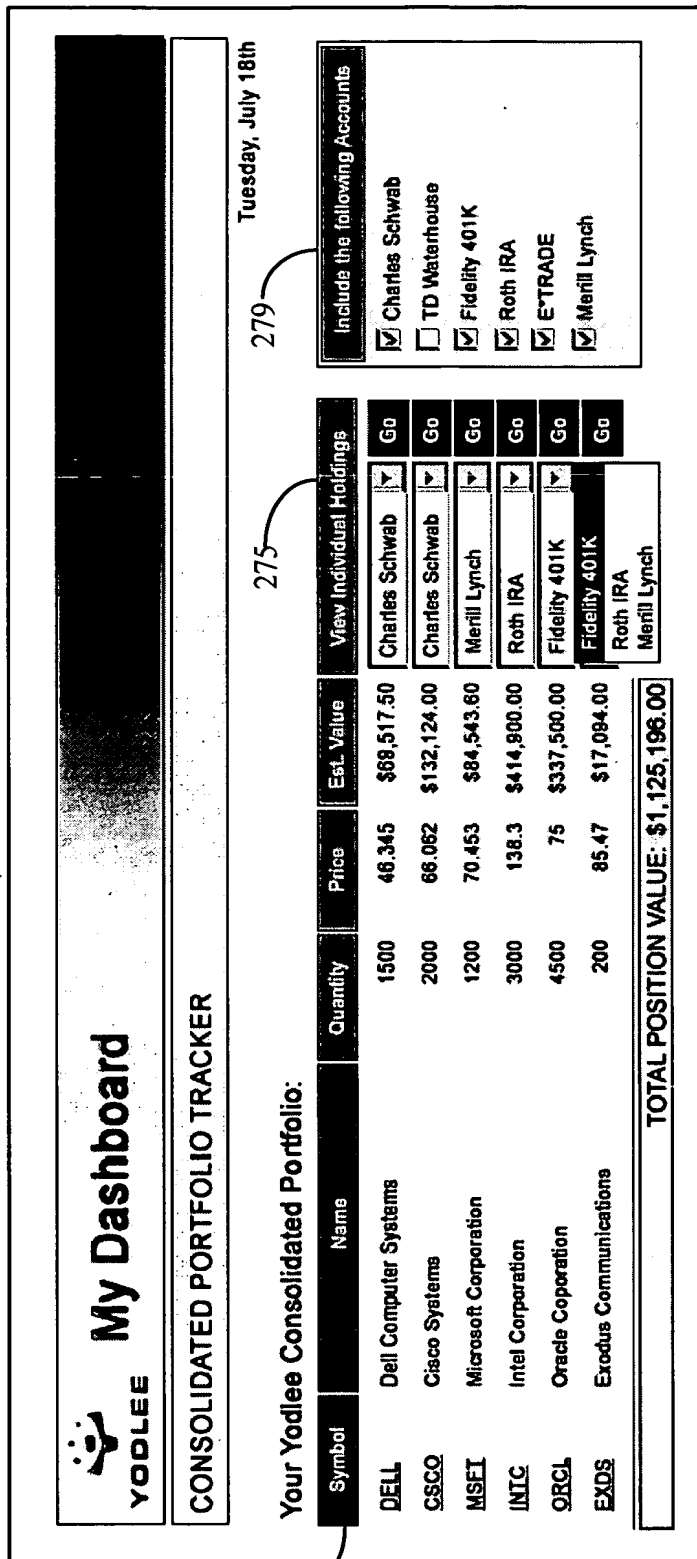


Fig. 15